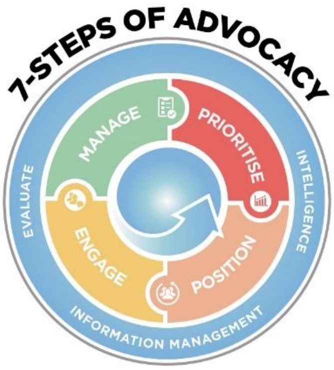
STEP 3 – POSITION

By Paul Shotton & Alan Hardacre (www.advocacystrategy.com)



Step 3 of the 7-step advocacy method concerns **positioning**.

To effectively influence policy and politics you need to:

- engage early (the right time),
- know your audience (the right person), and
- communicate convincing messages (the right information).

You need to combine your intelligence analysis on the policy process with data on the shifting constellations of influential stakeholders on your key priorities (stakeholder mapping).

Positioning, which is step 3 of the 7-step advocacy method, can be broken into three parts:

1. **Stakeholder mapping**: Identifying and analyzing key actors on your issues.
2. **Messaging**: Defining arguments and messages tailored to your audiences.
3. **Advocacy assets**: Identifying advocacy materials and updating them.

We will look at each of them in turn.

Stakeholder Mapping

Stakeholder mapping is the identification and analysis of stakeholders. Stakeholders steer the policy process through their interactions and decisions. Their involvement can be critical to success or they may pose a threat to success. Some stakeholders are a source of resources, while others may consume resources. All successful policy focused advocacy campaigns require you to identify those with influence over decision-making.

You should always start your stakeholder mapping with the policy process and decision-making procedure for your priority issue. The level of influence enjoyed by stakeholders in positions of influence is a major determinant of their importance for your mapping. From this core group of influential policymakers, you then expand your mapping to include key stakeholders from other organizations analyzing their influence, positions, engagement, activities, coalitions etc. To be complete your stakeholder mapping should extend beyond key national and regional politicians to all officials, advisers as well as companies, associations, experts, journalists, academics, think tanks, influencers, NGOs and advocacy platforms. Stakeholder mapping seeks to identify all the actors and organizations that are present and active on an issue.

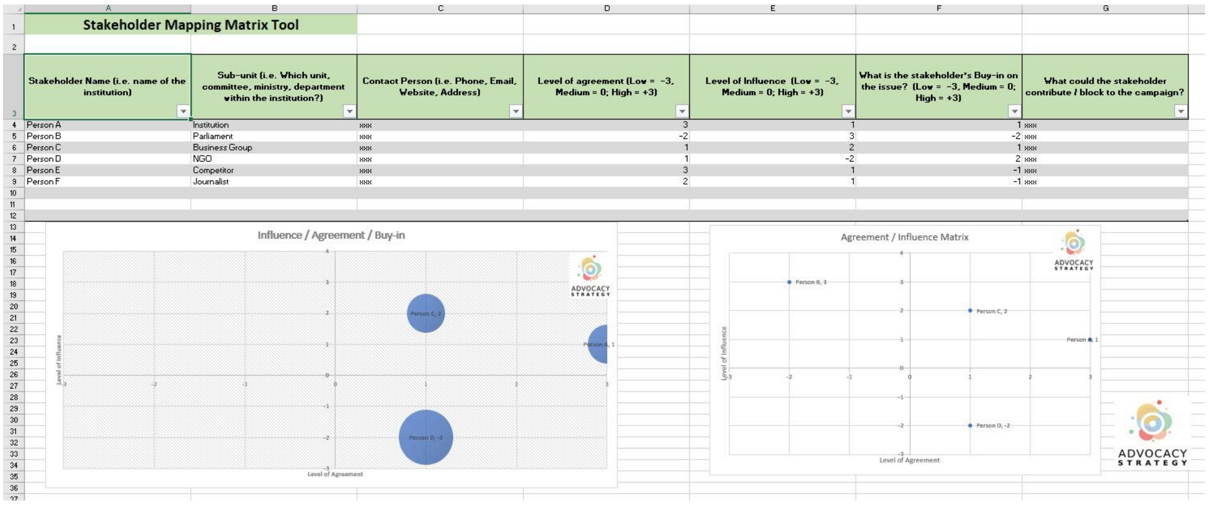
This exercise enables you to define primary and secondary targets and shape your strategy taking the policy process into account. Once you have the first map in place you need to focus on additional indicators in relation to each issue, such as:

- stakeholder influence
- stakeholder level of interest
- stakeholder position
- level of stakeholder activity (engagement).

It is also important to include logs of interactions with key stakeholders alongside the mapping data. The data used in stakeholder mapping should be sourced from both public and non-public sources, notably making use of institutional databases, transparency registers, events and (social) media.

The information you collect on stakeholders is easily managed using an (excel) spreadsheet. Try our free stakeholder mapping matrix tool with automatic visualizations (see below). You can also use Customer Relations Management (CRM) software to support logging interactions and communications. In fact, dedicated software platforms for Public Affairs such as Quorum, FiscalNote and ULobby, provide excellent stakeholder mapping functionalities. They provide both structure, data and tools to create insightful stakeholder maps. They also make it easier to ensure your mapping data is GDPR compliant. We strongly urge you to explore these platforms to remain competitive.

Visualizing your mapping is essential to your strategy and team buy-in. When translating your stakeholder mapping data from your excel (or other) table into a visualization you need to choose the axes you will use. The most common axes are the level of influence versus level of agreement. If you want to understand this better take a look at our excellent free stakeholder mapping tool.



Stakeholder Mapping Matrix Tool						
Stakeholder Name (i.e. name of the institution)	Sub-unit (i.e. Which unit, committee, ministry, department within the institution?)	Contact Person (i.e. Phone, Email, Website, Address)	Level of agreement (Low = -3, Medium = 0; High = +3)	Level of Influence (Low = -3, Medium = 0; High = +3)	What is the stakeholder's Buy-in on the issue? (Low = -3, Medium = 0; High = +3)	What could the stakeholder contribute / block to the campaign?
Person A	Institution	xxx	3	1	1	xxx
Person B	Parliament	xxx	-2	3	-2	xxx
Person C	Business Group	xxx	1	2	1	xxx
Person D	NGO	xxx	1	-2	2	xxx
Person E	Competitor	xxx	3	1	-1	xxx
Person F	Journalist	xxx	2	1	-1	xxx

Mapping is increasingly data-driven, making it more insightful and reliable. This game-changing development is driven by dedicated software platforms such as Quorum, FiscalNote and ULobby, but also by specialist organizations such as VoteWatch. Check out VoteWatch's excellent MEP mapping work here. Stakeholder mapping is also starting to make use of research methods such as social network analysis and sentiment analysis to identify gatekeepers, strength of ties and predicted behavior.

Use your mapping and intelligence to determine whether your issue is winnable or unwinnable. Taking the example of VoteWatch, their data allows you to micro-target swing votes (e.g. the undecideds you identified in your stakeholder mapping).

Our seven top tips on stakeholder mapping are:

1. **Consider process:** Use the policy process to identify your key policy-making stakeholders and their moment of optimum influence. Build out to other stakeholders from there.
2. **Continuously update:** Constantly update your stakeholder mapping to identify the people who make a difference and the people you need to speak to.
3. **Indicators:** Use indicators and measures that are evidence-based and apply to different stakeholder types.
4. **Extra Data:** Review your internally and externally produced intelligence stakeholder mapping data. The more data you have access to the better your advocacy.

5. **Upgrade your tools:** Diversify your sources, by trying service providers that can offer you quality insights on stakeholders, which you would otherwise not have access to. Explore the market.
6. **Create visuals:** Always build out some visuals. These will help you immensely for you planning, but also ensure professional presentation of your work.
7. **Data Privacy:** When holding information on stakeholders you must be [in the EU] GDPR compliant. We will write more about this in a future blog!

Messaging

Once you have mapped your stakeholder community (right person), you need to build a set of arguments and messages that are tailored to each of them. An argument is a reason or set of reasons given in support of an idea, action or theory. Arguments are conveyed through messages, which contain the main points you want your target audience to hear and remember. When developing arguments explore them from several perspectives. Arguments and messages are conveyed through stories, narratives and frames.

For advocacy success it is crucial that you adjust your frame to your audience. Try to make your story powerful, simple, repeatable and visual, and ensure your messages are consistent across audiences.

Advocacy Assets

After mapping and messaging we turn to the process of continuously updating and adapting advocacy assets. Your arguments and messages are set out in key advocacy documents (your advocacy assets). For effective advocacy on your advocacy priorities identify and update your key advocacy assets. The most common advocacy assets are:

1. Position Papers
2. Key Messages Documents
3. Media Statements
4. Presentations
5. Infographics

Make sure you identify the advocacy assets you think you need to succeed. Keep them updated on the basis of the intelligence and stakeholder mapping data. Update your assets with quality public and non-public intelligence data and analysis generated by your team, but also by third parties (i.e. VoteWatch). Always favor data that can help you tailor your messages to your different audiences, manage your resources through better targeting of stakeholders, generate feedback on what works and what doesn't, map out the existing political arena identifying dominant positions or coalitions beforehand.

In future videos we'll be exploring steps 4-7 to clearly define their purpose, but also to identify the key knowledge, skills, tools, and deliverables contained within them. To further explore our 7-steps of advocacy method as well as our free advocacy tools, including our free advocacy assessment 7-step snapshot report, please visit: www.advocacystrategy.com